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## Slovakia

## Sugar

## Annual

## 2004

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**Report Highlights:**

In 2003, Slovak sugar factories processed 1.17 million MT of sugar beets. Although this volume was down by 172,000 MT compared to 2002, sugar production dropped by only 11,000 MT due to a high average sugar content of 16.5 %. Slovakia is a net sugar exporter. Major changes in the Slovak sugar industry are not expected with Slovakia's EU accession in May 2004.

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Includes PSD Changes: Yes  
Includes Trade Matrix: No  
Unscheduled Report  
Vienna [AU1]  
[LO]

**Production**

In 2003, Slovak sugar factories processed 1.17 million MT sugar beets. This was 172,000 MT less than in 2002. The volume of sugar beet processing was down in 2003, but sugar production dropped by only 11,000 MT due to the high average sugar content of 16.5 % (2002: 15.4 %), the highest in 30 years. Average yields of sugar beet per hectare dropped to 36.8 MT in 2003 (2002: 43.6 MT/ha).

In 2003, planted area amounted to 32,000 ha and was 1000 ha less than the previous year. Sugar beet acreage for 2004 is expected to rise to 34,000 ha. Assuming that growing conditions are good and sugar content is at an average level, sugar production in 2005 could reach more than 200,000 MT.

**Consumption**

Per capita consumption of refined sugar in Slovakia in 2002 reached 27.6 kg/year (2001: 26.6 kg/year).

**Trade & Market**

Slovakia is a net exporter of sugar. Exports and imports dropped in 2003. Major export countries include Poland, Bosnia-Herzegovina, and Hungary, major import countries include Germany and Poland.

Slovakia's sugar production quota accounts for 207,432 MT (A + B quota).

In 2003, sugar beet producer prices rose to 1,100 SKK (US\$ 29.92) by 10.3 % compared to 2002.

In 2002, average consumer prices for sugar increased by 0.3 % to 26.68 SKK (US\$ 0.56) compared to the previous year.

**Sugar Industry**

Major changes in Slovak sugar industry are not expected with Slovakia's EU accession in May 2004.

There are 5 sugar factories located in Slovakia. Two of those (Rimavská Sobota and Sered) are owned by the Austrian sugar corporation "AGRANA Zucker und Staerke Aktiengesellschaft".

Average exchange rate:

\$1 = SKK 36.768 in 2003

| <b>PSD Table</b>         |                          |          |             |          |             |          |           |
|--------------------------|--------------------------|----------|-------------|----------|-------------|----------|-----------|
| <b>Country</b>           | <b>Slovakia</b>          |          |             |          |             |          |           |
| <b>Commodity</b>         | <b>Centrifugal Sugar</b> |          |             |          |             |          |           |
|                          | 2002                     | Revised  | 2003        | Estimate | 2004        | Forecast | UOM       |
|                          | USDA Official            | Estimate | DA Official | Estimate | DA Official | Estimate | [New]     |
| <b>Market Year Begin</b> |                          | 09/2001  |             | 09/2002  |             | 09/2003  | MM/YYYY   |
| Beginning Stocks         | 12                       | 148      | 29          | 148      | 40          | 132      | (1000 MT) |
| Beet Sugar Production    | 172                      | 182      | 186         | 172      | 175         | 164      | (1000 MT) |
| Cane Sugar Production    | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| TOTAL Sugar Production   | 172                      | 182      | 186         | 172      | 175         | 164      | (1000 MT) |
| Raw Imports              | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| Refined Imp.(Raw Val)    | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| TOTAL Imports            | 80                       | 10       | 70          | 9        | 70          | 4        | (1000 MT) |
| TOTAL SUPPLY             | 264                      | 340      | 285         | 329      | 285         | 300      | (1000 MT) |
| Raw Exports              | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| Refined Exp.(Raw Val)    | 0                        | 45       | 0           | 32       | 0           | 20       | (1000 MT) |
| TOTAL EXPORTS            | 0                        | 45       | 0           | 32       | 0           | 20       | (1000 MT) |
| Human Dom. Consumption   | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| Other Disappearance      | 0                        | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| Total Disappearance      | 235                      | 147      | 245         | 165      | 245         | 155      | (1000 MT) |
| Ending Stocks            | 29                       | 148      | 40          | 132      | 40          | 125      | (1000 MT) |
| TOTAL DISTRIBUTION       | 264                      | 340      | 285         | 329      | 285         | 300      | (1000 MT) |

| <b>PSD Table</b>         |                    |          |             |          |             |          |           |
|--------------------------|--------------------|----------|-------------|----------|-------------|----------|-----------|
| <b>Country</b>           | <b>Slovakia</b>    |          |             |          |             |          |           |
| <b>Commodity</b>         | <b>Sugar Beets</b> |          |             |          |             |          |           |
|                          | 2002               | Revised  | 2003        | Estimate | 2004        | Forecast | UOM       |
|                          | USDA Official      | Estimate | DA Official | Estimate | DA Official | Estimate | [New]     |
| <b>Market Year Begin</b> |                    | 10/2001  |             | 10/2002  |             | 10/2003  | MM/YYYY   |
| Area Planted             | 31                 | 31       | 32          | 32       | 0           | 34       | (1000 HA) |
| Area Harvested           | 30                 | 31       | 30          | 31       | 0           | 33       | (1000 HA) |
| Production               | 1346               | 1346     | 1449        | 1174     | 0           | 1598     | (1000 MT) |
| TOTAL SUPPLY             | 1346               | 1346     | 1449        | 1174     | 0           | 1598     | (1000 MT) |
| Utilization for Sugar    | 1346               | 1346     | 1449        | 1174     | 0           | 1598     | (1000 MT) |
| Utilizatn for Alcohol    | 0                  | 0        | 0           | 0        | 0           | 0        | (1000 MT) |
| TOTAL UTILIZATION        | 1346               | 1346     | 1449        | 1174     | 0           | 1598     | (1000 MT) |

| Export Trade Matrix |                   |                |       | Import Trade Matrix |                   |            |       |
|---------------------|-------------------|----------------|-------|---------------------|-------------------|------------|-------|
| <b>Country</b>      | Slovakia          |                |       | <b>Country</b>      | Slovakia          |            |       |
| <b>Commodity</b>    | Centrifugal Sugar |                |       | <b>Commodity</b>    | Centrifugal Sugar |            |       |
| Time Period         |                   | Units:         | 2002  | Time Period         |                   | Units:     | 2002  |
| Exports for:        |                   | MT             | 1     | Imports for:        |                   |            | 1     |
| U.S.                |                   | U.S.           | 0     | U.S.                |                   | U.S.       | 0     |
| Others              |                   | Others         |       | Others              |                   | Others     |       |
|                     |                   | Poland         | 22584 |                     |                   | Germany    | 38237 |
|                     |                   | Bosnia-Herzeg. | 11168 |                     |                   | Poland     | 14256 |
|                     |                   | Hungary        | 6719  |                     |                   | Czech Rep. | 5870  |
|                     |                   | Romania        | 2299  |                     |                   | Slovenia   | 1114  |
|                     |                   | Czech Rep.     | 1943  |                     |                   |            |       |
|                     |                   | Yugoslavia     | 1046  |                     |                   |            |       |
|                     |                   |                |       |                     |                   |            |       |
|                     |                   |                |       |                     |                   |            |       |
|                     |                   |                |       |                     |                   |            |       |
|                     |                   |                |       |                     |                   |            |       |
| Total for Others    | 0                 |                | 45759 | Total for Others    | 0                 |            | 59477 |
| Others not Listed   |                   |                | 725   | Others not Listed   |                   |            | 123   |
| Grand Total         | 0                 |                | 46484 | Grand Total         | 0                 |            | 59600 |

| Prices Table     |                   |                      |          |
|------------------|-------------------|----------------------|----------|
| <b>Country</b>   | Slovakia          |                      |          |
| <b>Commodity</b> | Centrifugal Sugar |                      |          |
| Prices in        | SKK               | per uom              | kg       |
| Consumer Prices  |                   |                      |          |
| Year             | 2001              | 2002                 | % Change |
| Jan              | 24.7              | 26.69                | 8%       |
| Feb              | 26.79             | 26.69                | 0%       |
| Mar              | 27.08             | 26.59                | -2%      |
| Apr              | 27.14             | 26.6                 | -2%      |
| May              | 27.03             | 26.57                | -2%      |
| Jun              | 27.02             | 26.59                | -2%      |
| Jul              | 26.67             | 26.56                | 0%       |
| Aug              | 26.54             | 26.57                | 0%       |
| Sep              | 26.49             | 26.7                 | 1%       |
| Oct              | 26.56             | 26.68                | 0%       |
| Nov              | 26.69             | 26.92                | 1%       |
| Dec              | 26.57             | 27.09                | 2%       |
| Exchange Rate    | 47.95             | Local Currency/US \$ |          |
| Date of Quote    | 1/1/2002          | MM/DD/YYYY           |          |